

How to Leave a Legacy Gift at CFMT

Leave a Charitable Bequest in Your Will

A bequest to a fund within CFMT is an ideal way to ensure that the charitable causes important to you and your family continue to be supported beyond your lifetime. You can designate a set amount or percentage of your estate, leave your house or leave all remaining assets. Bequests to CFMT can create significant tax savings for your heirs.

IRA or Retirement Plan Assets

You may designate CFMT as a primary or contingent beneficiary of your IRA or other retirement plan assets to support your charitable interests. Among other options, the IRA Charitable Rollover is easy for donors with IRAs to 'roll over' up to \$100,000 once they reach the age of 70½ to public charities without having to count the distributions as taxable income. We're ready to help our donors take advantage of this legislation and make gifts during your lifetimes. Our personalized service and local expertise helps you address the issues and causes most important to you.

Life Insurance

You can transfer ownership of a cash value policy during your lifetime to create or support your fund and be eligible for an immediate tax deduction based on the policy's current value. Naming CFMT as a beneficiary of any insurance policy can be part of an estate planning strategy.

Charitable Lead Trust

The Community Foundation of Middle Tennessee offers customized and personal charitable solutions to donors interested in current and planned giving opportunities. When you entrust The Foundation to connect your generosity with need, we honor your wishes in perpetuity.

For information on current gifts, such as giving stock, personal property or real estate, review the Types of Gifts PDF.

